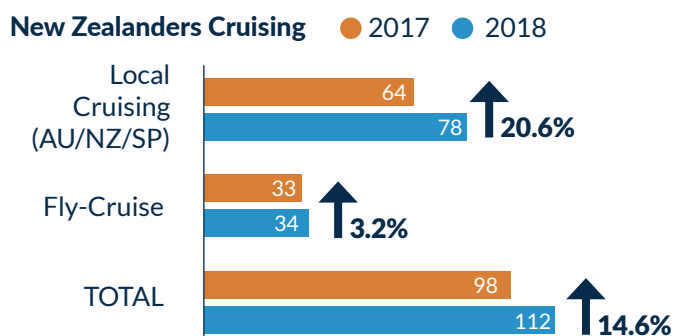


## NZ ocean source market surpasses 100,000 for the first time

The number of New Zealanders taking an ocean cruise hit a record high in 2018, breaking through the 100,000 barrier for the first time to reach a total of 112,000 passengers.

This was a 14.6 per cent increase on the previous year, giving the New Zealand source market a growth rate well ahead of the world's largest and more established cruise markets including the USA (9.4 per cent), and Europe (3.3 per cent).

Over the past 10 years, New Zealand ocean cruise passenger numbers have risen by an average of 13.5 per cent a year, and the outlook remains positive for continued growth in the future.



The growth was driven primarily by an increase in the number of New Zealanders cruising in the local region (up 20.6 per cent). The number who chose fly-cruise options in destinations further afield also continued to perform well in 2018 (up 3.2 per cent). Europe and the Mediterranean were the most popular long-haul destinations for New Zealand cruisers (up 19.6 per cent), followed by the Americas and Caribbean (down 4.3 per cent).

## Future Potential

While the industry continues to face constraints associated with infrastructure restrictions across the region, several new developments are expected to support future growth in the homeport market. These include the recent granting of consent for temporary mooring dolphins at Queens Wharf in Auckland which will allow larger cruise ships to berth, as well as the construction of a new International Cruise Terminal in Brisbane and the new Lyttelton cruise berth serving Christchurch.

Cruise lines have already announced significant new vessel deployments in this region beginning from 2020/2021. At the same time, smaller older vessels will be replaced with newer larger ships to cater to local and international passenger demand.

The outlook for the Australasian ocean cruise passenger market remains positive. As government and local stakeholders recognise the potential for the industry to offer an even broader and more frequent range of domestic itineraries, this will increase the contribution the industry is able to deliver to our national and regional economies.

Globally, there are 122 new cruise ships set for delivery by 2027 at a total cost of more than US\$64 billion. As the industry continues to invest in new vessels, new destinations and strong source markets such as Australasia have the potential to reap the rewards of increased deployment if they can meet capacity requirements.

### Among the findings of CLIA's annual report were:



The South Pacific maintained its place as the most popular destination for New Zealand cruisers with the region attracting almost one in three of the nation's ocean cruise passengers



Europe and the Mediterranean became the most popular long haul fly-cruise destination with an additional 2,200 Kiwis heading to the region for a fly-cruise holiday.



The number of New Zealanders cruising in the South Pacific experienced the largest growth in 2018 - with 36,500 cruising, up 27.5 per cent from 2017.



The equivalent of 2.5 per cent of New Zealand's population took an ocean cruise last year, giving the nation a greater market penetration rate than established cruise markets like Italy (1.3 per cent), Spain (1.1 per cent) and France (0.8 per cent)



The average age of New Zealand cruise passengers fell from 52 to 51, with around 60 per cent of passengers under the age of 60

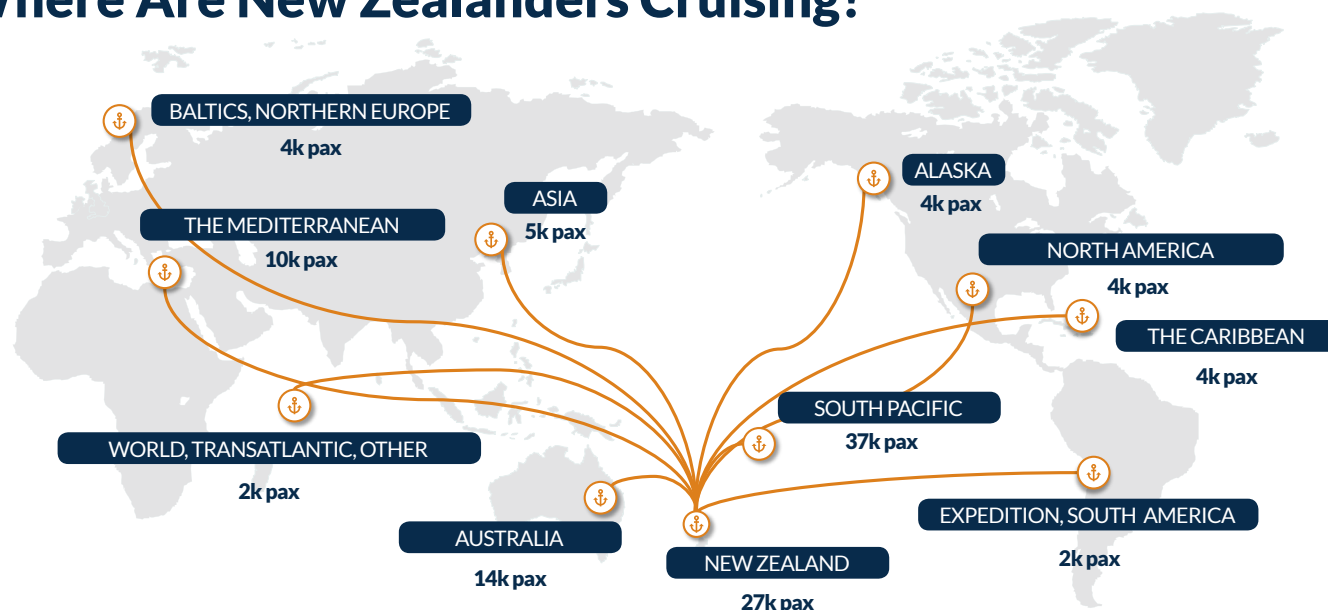


The most popular cruise duration was 8-13 days, attracting 46 per cent of cruisers, though shorter voyages of less than 4 days once again saw the biggest increase, up 144 per cent



New Zealand cruises continued to be the second most popular with 24.2% of Kiwis choosing to cruise close to home

# Where Are New Zealanders Cruising?



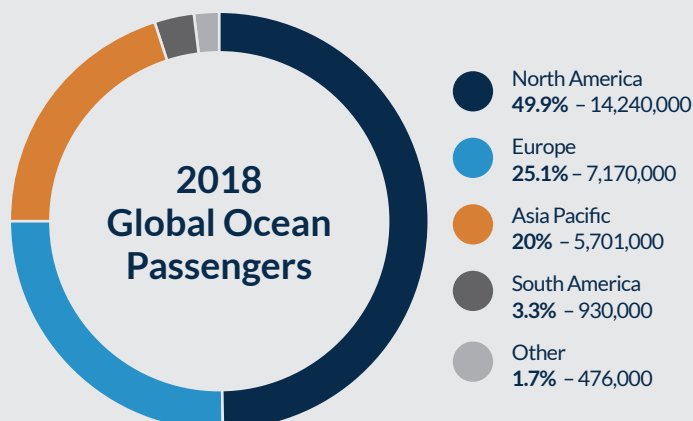
In 2018, the majority of New Zealand cruisers continued to sail within Australia, New Zealand and the South Pacific (69.2 per cent). Of these, 36,500 sailed on South Pacific cruises (up 27.5 per cent), while 27,100 cruised in New Zealand (up 18.1 per cent), and 13,900 sailed in Australia (up 9.3 per cent). As a result, regional ports and destinations continued to benefit from domestic cruise travellers, delivering significant economic impact to local communities including for restaurants, hotels, shops, transportation and local tour operators.

In terms of fly-cruise, Europe and the Mediterranean were the most popular long-haul destinations for New Zealanders in 2018, accounting for 12.1 per cent of cruisers. A further 10.6 per cent cruised in North America and the Caribbean, while Asia followed with 4.7 per cent of cruise travellers.

## World Perspective

There was a 6.7 per cent increase in the number of people taking a cruise globally last year, with 28.5 million cruisers worldwide. This figure is forecast to break the 30 million barrier in 2019.

While the cruise sector represents only 2.0 per cent of the overall global travel industry, it continues on a similar growth pattern to international tourism worldwide. According to the latest UNWTO World Tourism Barometer, international tourist arrivals grew 6.0 per cent in 2018, totalling 1.4 billion, while cruise travel grew at 6.7 per cent over the same period.



### Among the findings of CLIA's 2018 global statistics were:

- With 5.1 per cent of global cruise passengers hailing from Australasia, the region was the fourth largest source market in the world. As a region with a comparatively small population, Australasia punches well above its weight.
- Cruises in the Mediterranean rose in popularity with global cruisers.
- Passengers preferred shorter cruise durations with seven-day cruise itineraries up 9.0 per cent and cruises of three days or less up 10 per cent.
- Some 11.3 million cruise passengers travelled to the Caribbean in 2018, up six per cent.
- Alaska has experienced double-digit growth with a 13 per cent increase in 2018.
- When compared to the rapid increases of the past, 2018 saw moderate cruise passenger growth throughout Asia and China with a 5.0 per cent rise in cruise passengers from the region.

# Who is cruising in Australasia?

The Australasia region continues to be an attractive cruise destination for inbound holidaymakers with around 200,000 international cruise visitors. In total, cruisers from more than 145 different countries visited the region.

In 2018, North America was the largest source of inbound cruise visitors (125,000), followed by Western Europe (42,000). The growing source market of Asia (14,000) continues to deliver significant cruise passengers to the region, doubling in 2018.



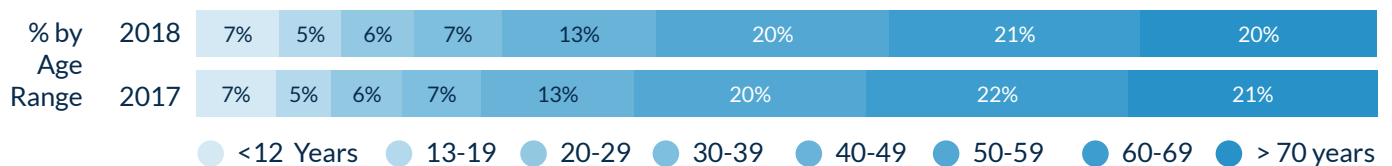
## DEMOGRAPHICS

### Passenger Age

The strength of the New Zealand cruise market also lies in its appeal to a broad demographic and across all age groups. New Zealand cruisers continue to come from across the age spectrum, underlying the wide array of cruises and destinations now on offer.

The average age of New Zealand cruise passengers fell from 52 to 51, with around 60 per cent of passengers under the age of 60.

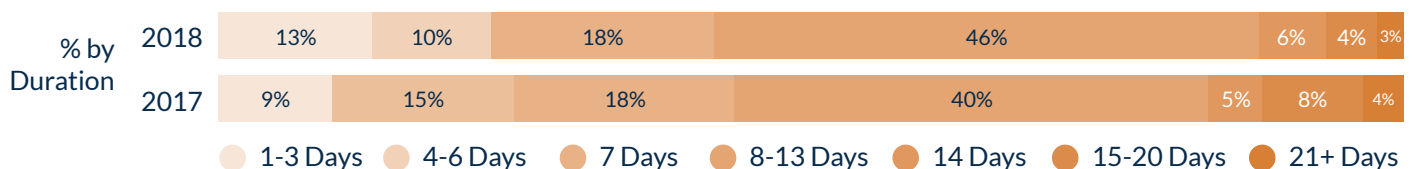
With the overall distribution pattern largely unchanged for the past 5 years, this reflects the appeal of all types of cruising and the diversity of itineraries across the board.



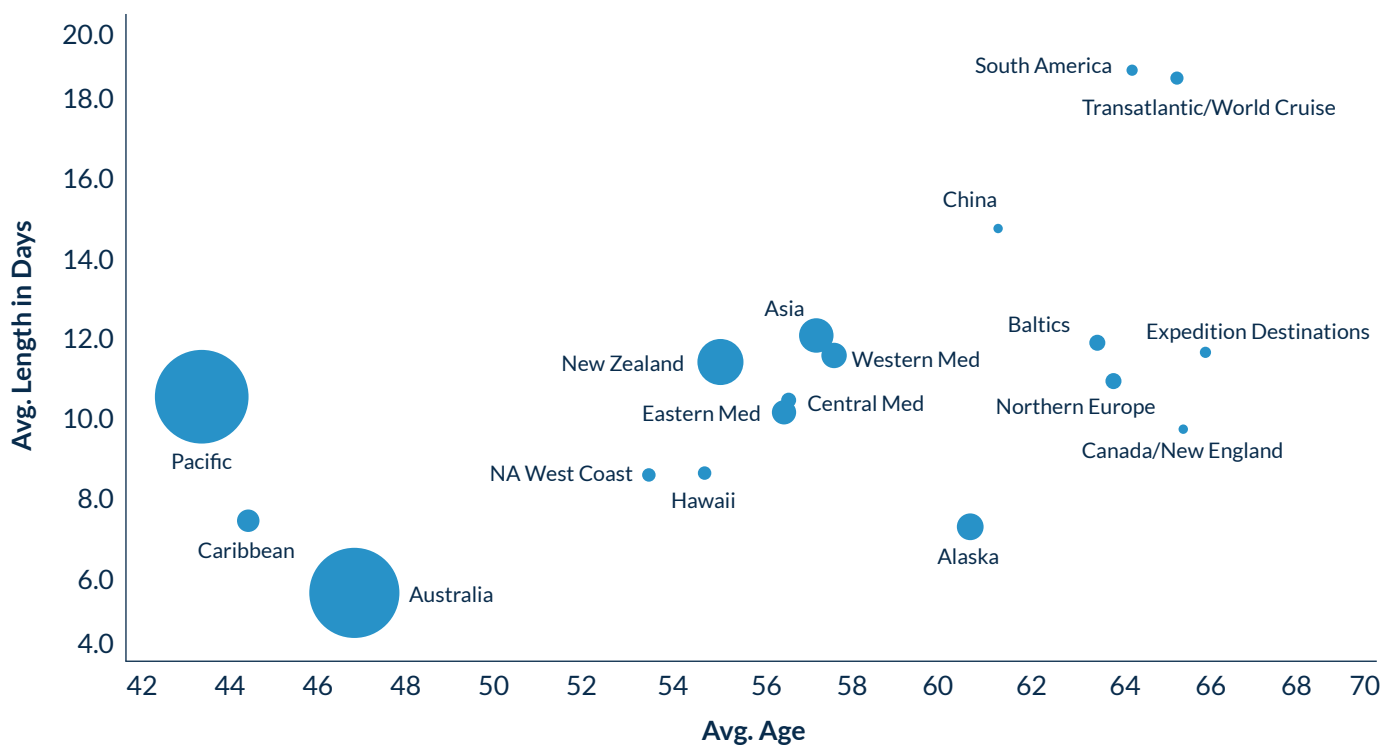
### Cruise Length

The most popular cruise duration in 2018 was 8-13 days, with around 46 per cent of all passengers opting for this length cruise. Shorter voyages of less than four days saw the biggest jump of 144 per cent.

Overall, 41 per cent of New Zealand cruisers took a cruise of seven days or less, and 93 per cent took a cruise of 14 days or less.



Looking at the distribution of passengers by cruise destination and age, local itineraries in Australia and the South Pacific, as well as cruises in the Caribbean appealed to younger cruisers. Middle-age cruisers were more likely to be attracted to cruise in New Zealand, the US Pacific region, the Mediterranean, and Asia. The average age increases into the 60's for passengers venturing to Alaska, the Baltics & Northern Europe, and on longer cruises to Panama & South America, Transatlantic & World Cruises, and Expedition itineraries.



**Note:** This report is based on 2018 calendar year passenger statistics provided by CLIA's ocean Cruise Line members, representing over 95 per cent of the global cruise industry capacity, plus additional data collected from non-CLIA Cruise Lines. The research is based on a methodology that is used in similar studies around the world. The consistency of approach facilitates comparisons with other major cruise markets. Data points below 2000 are not shown.

Cruise Lines International Association (CLIA) is the world's largest cruise industry trade association, providing a unified voice and leading authority of the global cruise community. CLIA supports policies and practices that foster a safe, secure, healthy and sustainable cruise ship environment and is dedicated to promoting the cruise travel experience. Economic, environmental and cultural sustainability is of the utmost importance to the cruise industry. We support local economies not just by bringing guests and crew to their shores but by using local services and goods on our ships. We sustain +1.1M jobs and US\$134B in economic impact worldwide. Every day, the global cruise industry is hard at work protecting the environment and strengthening local destinations through bold leadership, innovative stewardship, and strong strategic partnerships. For more information about CLIA and the Cruise Industry visit [www.cruising.org.au](http://www.cruising.org.au)